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United States
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Foreign
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USSR Grain Situation and Outlook

Circular Series
SG 8-88
November 1988

MAY 16 '89

1988 CROP ESTIMATE DOWN

The 1988 Soviet grain crop estimate was lowered this month by 5 million tons to 200 million, based on recently announced preliminary yield results from the Ukraine and lower-than-expected state grain procurements from other major grain producing areas. Production estimates changed as follows: wheat down by 3 million tons to 88 million and barley down by 2 million to 45.5 million. Area figures are unchanged.

Seeding of winter grains was completed by the end of October with sown area totalling over 32 million hectares, about the same as last year.

WEATHER AND CROP DEVELOPMENTS

In the European USSR, winter grain planting was completed early in October while most corn harvesting was finished by the end of the month. Most crop areas received below-normal precipitation during October with dry weather covering parts of the eastern and western Ukraine, the northern North Caucasus, the eastern Black Soils Region, and the Volga. Although the dry weather helped late season harvesting, there was limited moisture available for winter grain establishment. Infrequent rain in the southern Ukraine and the southern North Caucasus still produced above-normal precipitation. The rain in these areas benefited winter grain establishment and caused only brief delays in harvest. Following an unusually mild weather pattern in early October, unseasonable cold weather began over northern crop areas on October 21 and spread rapidly southward. By month's end, winter grains entered dormancy at usual dates in northern crop areas.

Beginning in early November, unseasonable cold weather continued over the European USSR, accompanied by light snow as far south as the Black Sea coast. Winter grains began to enter dormancy in the Ukraine and North Caucasus about 2-3 weeks earlier than usual.

IMPORT ESTIMATE INCREASED

Recent large coarse grain purchases and expectations that purchases for the second half of the marketing year will continue heavy have prompted an increase in the estimate of USSR total grain imports to 31 million tons, up 2 million tons from a month ago and only fractionally below the 1987/88 level.

The combination of a smaller 1988 USSR coarse grain crop and relatively attractive world corn prices has resulted in heavy USSR corn purchases so far during the 1988/89 marketing year. Coarse grain purchases to date total around 8 million tons with the bulk of the sales calling for delivery before the end of December. Based on the above and taking into account the strong push in the Soviet Union to increase livestock production, the estimate of USSR coarse grain imports for the July-June 1988/89 marketing year has been increased to 17 million tons. This is 3 million tons higher than a month ago and would be the largest imports since 1984/85.

USSR corn imports in 1988/89 are expected to increase sharply as a result of limited availabilities of feed wheat on the world market and high barley prices. Again the United States is expected to be the major corn supplier, followed by Argentina and China. Large USSR barley imports are expected to continue although the Soviets are believed to only have covered around one million tons of a projected 3 million ton import program.

The combination of strong world wheat prices, shrinking exportable supplies in the Southern Hemisphere, and no new sales of U.S. wheat is being reflected in the slow pace of USSR wheat buying so far during the 1988/89 marketing year. Purchases to date from all origins total only around 5 million tons. This is well short of the usual level of buying at this time of the marketing year. Thus, the estimate of USSR wheat imports for July-June 1988/89 has been reduced to 13 million tons. This would be the smallest USSR wheat imports since 1979/80, although not much different from 1986/87 when it was estimated that around 4 million tons of total Soviet wheat imports were feed quality wheat with the balance milling quality wheat, including durum. USSR imports of feed quality wheat in 1988/89 are expected to be minuscule with virtually all of the 13 million ton import estimate consisting of milling wheat.

DOMESTIC USE ESTIMATE REDUCED

The forecast of USSR domestic use of grain at 233 million tons is down slightly from a month ago. Actual utilization of grain including seed, industrial use, food, and feed is projected at a record 211 million tons. The allowance for dockage and waste has been placed at 22 million tons or 11 percent of the projected crop. This is down slightly from last month's estimate. For the first time since 1981/82 marketing year, total utilization is expected to exceed the grain harvest, resulting in a modest reduction in both wheat and coarse grain stocks during 1988/89.

The quality of the 1988 forage crop is improved, however, total output is unlikely to show any growth from the level a year ago.

The most recent report on livestock inventories continues to show some down turn in cattle and hog inventories from a year ago and record large poultry inventories.

USSR: Livestock Inventories on State and Collective Farms as of October 1, 1983-1988

Inventories	1983	1984	1985	1986	1987	1988
	-----million head-----					
Total cattle	93.7	95.7	95.4	96.5	96.2	94.6
of which, cows	29.8	29.7	29.4	29.1	28.9	28.6
Hogs	61.5	62.3	60.3	63.1	60.9	60.7
Sheep & goats	125.0	124.1	121.0	124.0	123.3	123.7
Poultry	743.4	755.0	777.1	776.2	791.0	799.4

USSR Grain Area, Yield, and Production
1975-1987, and 1988 (Projected)

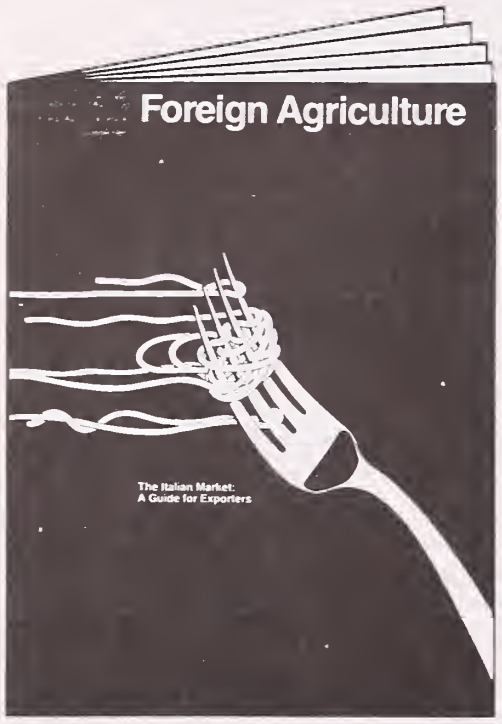
Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988 (Projected)	49.0	1.80	88.0
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988 (Projected)	57.0	1.72	98.0
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988 (Projected)	115.0	1.74	200.0

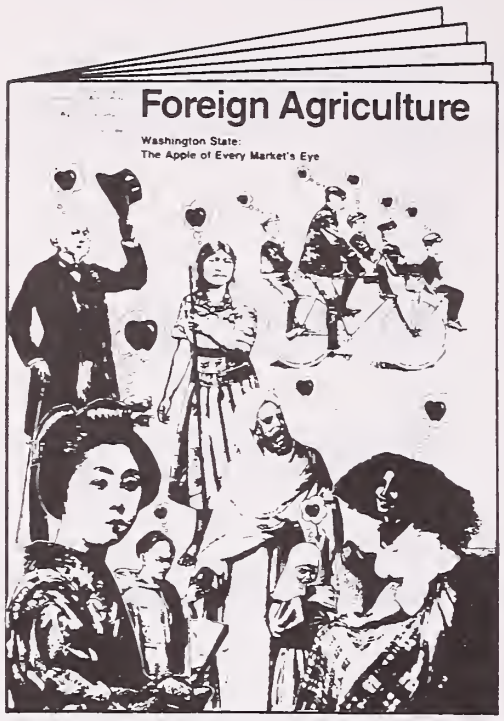
1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1988/89

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
	(Million Metric Tons)										
					Total Grains 4/						
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7
1987/88 5/	211.4	32.0	0.5	243	239	25	5	47	30	132	+4
Projected 1988/89	200.0	31.0	1.0	230	233	25	5	47	22	134	-3
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5
1987/88 5/	83.3	21.5	0.5	104	101	11	1	36	13	40	+3
Projected 1988/89	88.0	13.0	1.0	100	102	11	1	36	10	44	-2
					Coarse Grains						
1975/76	65.8	15.6	—	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	—	100	102	12	4	7	10	68	-2
1980/81	80.5	18.0	—	98	101	12	4	7	12	66	-2
1981/82	69.3	26.0	—	95	98	13	3	7	7	68	-3
1982/83	91.8	12.5	—	104	101	13	3	7	9	69	+3
1983/84	101.9	11.5	—	113	112	13	3	7	11	78	+2
1984/85	90.5	26.9	—	117	114	12	4	7	10	81	+4
1985/86	100.0	13.7	—	114	114	12	4	7	9	82	—
1986/87	105.9	11.0	—	117	115	13	4	7	11	80	+2
1987/88 5/	113.7	10.0	—	124	123	13	4	7	15	84	+1
Projected 1988/89	98.0	17.0	—	115	116	13	4	7	11	81	-1

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.





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SG 7-88
October 1988

USSR Grain Situation and Outlook

EXCHANGE Rec'd
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1988 Crop Estimate Unchanged

The 1988 Soviet grain crop estimate continues at 205 million tons including 91 million tons of wheat; 100 million tons, coarse grains; and 14 million tons, miscellaneous grains and pulses. The total grain area estimate remains at 115 million hectares. Although the Soviets have yet to release an official total grain production number, several statements have been reported in the media, all indicating a crop smaller than last year's. State grain procurements are also reported below 1987, although crop quality is improved this year.

As of October 3, 1988, the Soviets reported grains and pulses had been cut on 103.1 million hectares and threshed on 102.5 million hectares, compared with an estimated 101.6 million hectares cut and 98.7 million hectares threshed on this date in 1987.

Seeding progress of winter crops is well ahead of last year, with 36.1 million hectares sown as of October 3.

Weather and Crop Developments

In the European USSR, corn was being harvested during September while winter grain planting advanced southward. Periodic rain in Belorussia, the western portion of the Central Region, the southern two-thirds of the Black Soils Region, and the upper Volga provided ample moisture for winter grain emergence and early growth. Minimal September rain in the southern portion of the Central Region and the northern Black Soils Region created unfavorable conditions for winter grain emergence and early plant establishment. In the Ukraine and the North Caucasus, moderate to heavy rain during September 4 - 10 produced above-normal September precipitation and increased pre-planting topsoil moisture for winter grains. Dry weather returned to these areas on September 11, and continued until month's end, helping the corn harvest and winter grain planting.

In spring grain areas east of the Ural mountains, persistent showers September 5 - 22 in the northern Urals produced above-normal September precipitation and caused some delays in spring grain harvesting. Unseasonable warm, dry September weather in Kazakhstan and West Siberia allowed spring grain harvesting to progress without delay. This year's spring grain harvest has progressed more rapidly than last year when widespread wet weather caused significant harvest delays.

Recently, the first significant rain since early September moistened topsoils in the eastern half of the Ukraine and the western North Caucasus, favoring winter grain emergence. Showers in eastern spring grain areas delayed final harvest efforts.

Grain Import Estimate Increased

There was an increase in the pace of USSR grain purchases this past month. Total purchases from all origins are currently estimated at around 12 million tons. At this time a year ago, purchases were approaching 10 million tons. Coarse grains have accounted for the bulk of the recent buying activity, with additional U.S. corn sales reported and official confirmation of French and U.K. barley sales. U.S. corn sales to the USSR already exceed total corn shipments in July-June 1986/87 and 1987/88. Sales to date have called for delivery before December 1988, so chances are good that additional U.S. corn sales will be made for the December-June shipping period. Rumored wheat sales have been slow to be confirmed, with the only business actually on the books, the 1 to 2 million tons sold by the EC. So far, no sales or shipments have been confirmed from the weather-plagued 1988 Canadian wheat crop. The U.S. has yet to sell wheat to the USSR for July-June 1988/89 delivery. At this time a year ago, the United States had already sold over 3 million tons to the USSR under the Export Enhancement Program. Eastern Europe, with a projected record wheat crop, is likely to account for a significantly larger share of the USSR wheat market in 1988/89.

Reflecting large early-season U.S. corn sales, expected heavy coarse grain sales by other suppliers and stronger than expected growth in livestock production, the estimate of USSR coarse grain imports for 1988/89 has been increased to 14 million tons, up 2 million tons from the month-earlier estimate and the largest since 1984/85. Total grain imports are now estimated at 29 million tons, with the estimate of wheat imports continued at 14 million tons. Miscellaneous grains, rice and pulses imports again are expected to account for about one million tons.

USSR wheat imports are expected to total around 14 million tons in 1988/89 as a larger and higher quality 1988 wheat crop and smaller supplies of quality wheat worldwide combine to limit imports. In addition, reduced supplies of feed quality wheat in the market place and higher feed wheat prices relative to corn are expected to reduce USSR feed wheat imports.

Coarse grain imports in 1988/89 are expected to equal or exceed wheat imports for the first time since 1981/82. During the 1970's and early 1980's, USSR coarse grain imports were typically higher than wheat imports as a series of modest coarse grain crops, combined with efforts to increase livestock productivity, resulted in large coarse grain imports. However, during much of the 1980's, a combination of better USSR coarse grain crops, along with efforts to diversify sources of supply and heavier feed wheat imports, resulted in wheat imports exceeding coarse grains in most years.

Domestic Use Estimates Increase

Reflecting strong growth in the USSR livestock sector, the estimates of domestic use for both the 1987/88 and 1988/89 marketing years have been increased. Calendar year (CY) 1987 livestock production data was recently revised upward indicating heavier feed requirements than earlier expected and resulting in a higher 1987/88 grain for feed total. In addition, this revision in CY 1987 data suggests that grain for feed requirements in 1988/89 will be higher than earlier projected.

Forage Crop Quality and Output Up

Based on the progress of forage harvesting, Soviet production of non-grain feeds in 1988 should top last year's record level. While hay and haylage output are about equal to last year, silage output is up substantially. Output of grass meal continues to decline, reflecting the trend of the last few years. The overall quality of this year's roughage crop should also be up.

USSR Grain Area, Yield, and Production
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Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
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1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7
1987/88 5/	211.4	32.0	0.5	243	239	25	5	47	30	132	+4
Projected 1988/89	205.0	29.0	1.0	233	234	25	5	47	23	134	-1
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5
1987/88 5/	83.3	21.5	0.5	104	101	11	1	36	13	40	+3
Projected 1988/89	91.0	14.0	1.0	104	104	11	1	36	10	46	0
					Coarse Grains						
1975/76	65.8	15.6	—	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	—	100	102	12	4	7	10	68	-2
1980/81	80.5	18.0	—	98	101	12	4	7	12	66	-2
1981/82	69.3	26.0	—	95	98	13	3	7	7	68	-3
1982/83	91.8	12.5	—	104	101	13	3	7	9	69	+3
1983/84	101.9	11.5	—	113	112	13	3	7	11	78	+2
1984/85	90.5	26.9	—	117	114	12	4	7	10	81	+4
1985/86	100.0	13.7	—	114	114	12	4	7	9	82	—
1986/87	105.9	11.0	—	117	115	13	4	7	11	80	+2
1987/88 5/	113.7	10.0	—	124	123	13	4	7	15	84	+1
Projected 1988/89	100.0	14.0	—	114	115	13	4	7	12	79	-1

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total 2/
April 1985	2,016	388	716	930	1,225	5,275	
May	1,566	1,237	468	921	1,368	5,560	
June	106	481	211	1,116	580	2,494	
April-June	3,688	2,106	1,395	2,967	3,173	13,329	14,700
July	8	---	25	208	443	684	
August	---	---	---	152	281	433	
September	---	1,384	---	75	59	1,518	
July-Sept	8	1,384	25	435	783	2,635	3,600
October	411	1,057	89	200	316	2,073	
November	2,487	900	212	485	423	4,507	
December	1,337	750	101	1,155	57	3,400	
Oct-Dec	4,235	2,707	402	1,840	796	9,980	11,400
January 1986	980	171	450	1,160	15	2,776	
February	956	---	494	1,080	---	2,530	
March	71	---	850	852	---	1,773	
Jan-March	2,007	171	1,794	3,092	15	7,079	7,900
April	---	---	373	487	---	860	
May	172	435	575	445	220	1,847	
June	547	646	34	582	172	1,981	
April-June	719	1,081	982	1,514	392	4,688	6,400
July	---	604	---	51	---	655	
August	---	501	---	---	---	501	
September	---	666	14	1	---	681	
July-September	---	1,771	14	52	---	1,837	2,600
October	---	1,027	211	314	---	1,552	
November	--	1,264	300	640	---	2,204	
December	---	1,198	129	740	---	2,067	
October-December	---	3,489	640	1,694	---	5,823	6,900
January 1987	---	383	153	642	75	1,253	
February	---	207	101	1,140	330	1,778	
March	316	497	134	1,165	303	2,415	
Jan-March	316	1,087	388	2,947	708	5,446	6,400
April	1,753	1,018	129	1,452	765	5,117	
May	1,840	777	123	1,050	412	4,202	
June	193	11	13	150	40	407	
April-June	3,786	1,806	265	2,652	1,217	9,726	12,400
July	1,915	---	---	59	10	1984	
August	1,064	---	---	25 3/	---	1,089	
September	316	74	---	25 3/	---	415	
July-September	3,295	74	---	109 3/	10	3,488	4,600
October	---	872	---	550 3/	---	1,422	
November	525	357	---	725 3/	---	1,607	
December	1,703	332	---	450 3/	---	2,485	
October-December	2,228	1,561	---	1,725 3/	---	5,514	6,500
January 1988	1,852	72	---	650 3/	---	2,574	
February	1,746	93	---	690 3/	135	2,664	
March	2,255	101	---	950 3/	486	3,792	
Jan-March	5,853	366	---	2,290 3/	621	9,030	9,900
April	2,406	713	---	600 3/	332	4,051	
May	1,995	1,123	---	450 3/	6	3,574	
June	755	898	---	300 3/	---	1,953	
April-June	5,156	2,734	---	1,350 3/	338	9,578	10,500
July	375	131	---	N/A	35	541	
August	621	---	---	N/A	275	896	
September							
July-September							

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available
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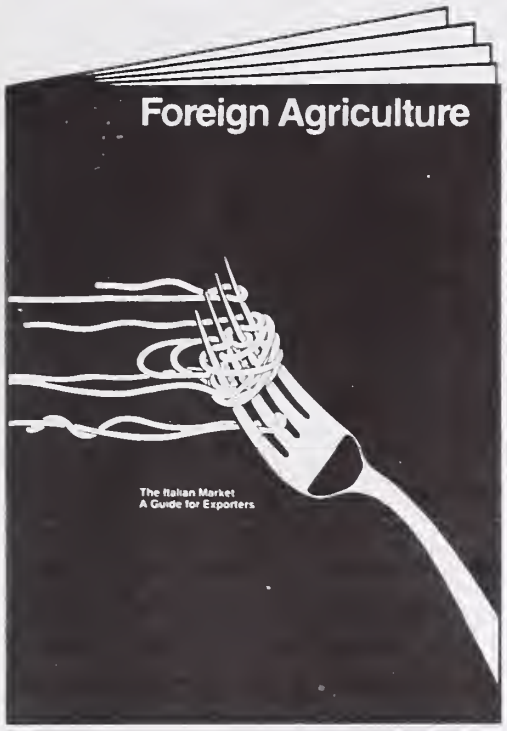

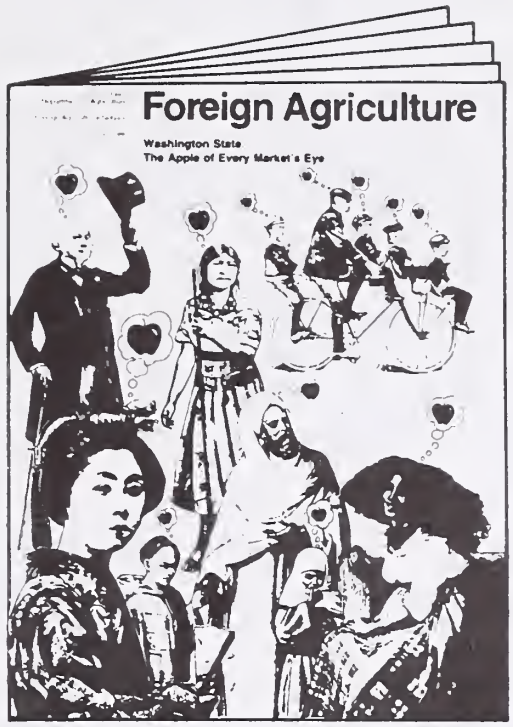

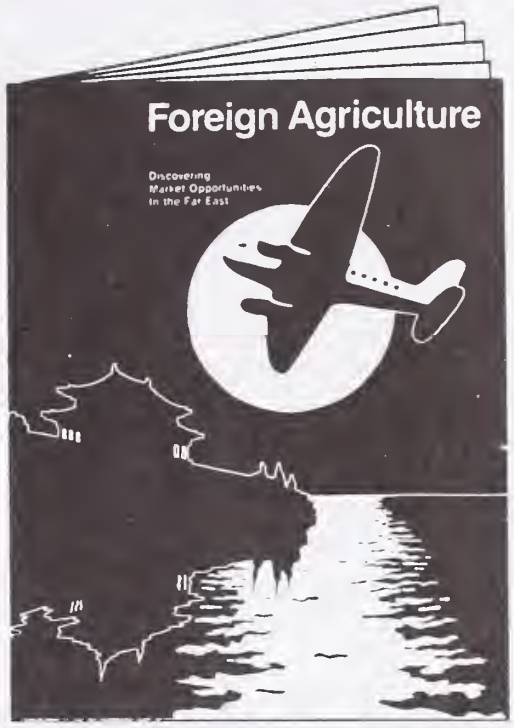

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United States
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SG 6-88
September 1988

USSR Grain Situation and Outlook

USSR GRAIN PRODUCTION ESTIMATE DOWN

The 1988 Soviet grain crop estimate was lowered this month by 5 million tons to 205 million based primarily on early yield results released by the Soviets. Preliminary yields, excluding corn, from several key areas have fallen below expectation. Additionally, on September 7, 1988, Moscow television reported that the 1988 grain harvest would be less than last year. Production estimates changed as follows: Barley down by 3 million tons to 47.5 million; rye down by 1 million to 16.5 million; and oats down by 1 million to 16.5 million. No changes were made to any area figures.

As of September 5, 1988, the Soviets reported 91.8 million hectares of grains and pulses (excluding corn) had been cut and 88.7 million threshed. Both of these figures were ahead of last year and the 1983-1987 average.

WEATHER AND CROP DEVELOPMENTS

In the European USSR, crop harvesting progressed rapidly during August and planting of 1989 winter grain crops began in northern areas. Above-normal August precipitation covered the Baltic States, Belorussia, and the western and northern Ukraine. Frequent rain during the month delayed spring grain harvesting. Widespread showers from August 7 - 19 in the upper Volga, the Volga Vyatsk, and the eastern portion of the Central Region followed dry weather since mid-June. Although rain may have caused some delays in crop harvesting, it improved soil moisture for winter grain planting. Dry weather returned to these areas on August 20 and continued until month's end, allowing uninterrupted harvesting and winter grain planting. Further south, there was below-normal August precipitation in the eastern Ukraine and the North Caucasus where corn was in the filling to maturing stages of development.

In crop areas east of the Ural mountains, unseasonable warm, dry weather continued over most spring grain areas during August, helping spring grain harvesting in the southern Urals and Kazakhstan, and hastening crop maturity in West Siberia. Crop areas which received above-normal precipitation were few, including areas around Perm, Orenburg, Karaganda, and Semipalatinsk.

Widespread substantial precipitation began over the southern Ukraine on September 8 and spread eastward, increasing topsoil moisture for winter grain planting, but causing some delays in early corn harvesting. Precipitation increased in crop areas east of the Ural mountains, slowing the spring grain harvest.

Approved by the World Agricultural Outlook Board – USDA

IMPORT ESTIMATE INCREASED

Some further decline in prospects for the 1988 USSR coarse grain crop along with the recent purchases for nearby delivery have resulted in an increase in the estimate of coarse grain imports to 12 million tons, somewhat above the levels of the past 2 seasons. Total grain imports are now estimated at 27 million tons, up 2 million from a month ago, including 14 million wheat and 1 million miscellaneous grains, pulses and rice.

Over the past month, numerous reports have been received of USSR grain purchases, breaking the lull in Soviet grain buying activity that had prevailed since last spring. The bulk of the recent purchases have been coarse grains, although reports have also indicated wheat sales by some of the major suppliers. Total purchases from all origins for 1988/89 shipment are currently estimated at 8 - 9 million tons, equivalent to about a third of total projected USSR grain imports.

WHEAT IMPORT ESTIMATE UNCHANGED

USSR wheat imports for the 1988/89 marketing year are projected at 14 million tons, unchanged from a month ago and well below last year's imports. Imports of feed quality wheat are expected to account for only a small portion of 1988/89 imports. This would be in sharp contrast to 1986/87, the last year when the Soviet's had a large wheat harvest. In that year, USSR wheat imports totaled 16 million tons with over a fourth of the total believed to be feed quality wheat. Feed wheat supplies were relatively abundant in 1986/87 but are expected to be much smaller in 1988/89. Reduced world wheat supplies and higher wheat prices are expected to limit feed quality wheat trade. Based on early reports, procurements of better quality wheats are up so far this crop year. This combined with smaller exportable supplies of high quality wheat on the world market and high prices, is expected to limit USSR imports of quality wheat.

COARSE GRAIN IMPORTS INCREASE

Expectations of smaller domestic supplies in 1988/89, along with some recent stability in world corn prices have resulted in a pickup in USSR coarse grains purchases. U.S. corn sales to the USSR now total over 3 million tons. Corn sales by Argentina, China, and some East European countries have pushed coarse grain purchases to nearly 4 million tons. Most of the sales are for delivery over the next couple of months so additional USSR coarse grain purchasers are likely for delivery before the end of 1988. Corn is expected to continue to dominate USSR coarse grain purchases in 1988/89. However, large barley supplies, particularly in the EEC, could result in increased USSR barley purchases. Small purchases of oats, rye, and grain sorghum are also expected.

DOMESTIC USE ESTIMATE UNCHANGED

The forecast of USSR domestic use of grain at 233 million tons is unchanged from a month ago. Grains moving into actual utilization, seed, industrial, food and feed use, is projected to hit an all time high in 1988/89 of 209 million tons. In contrast, reflecting the good 1988 harvesting season, the allowance for dockage and waste of about 11 percent of the 1988 harvest or 23 million tons is lower than last year. With total utilization now expected to exceed the 1988 harvest, USSR grain stocks are expected to fall modestly in 1988/89.

NON-GRAIN FEED SUPPLIES IMPROVING

Production of non-grain feed supplies moved ahead of last year's pace in August. As of August 15, production was 4 percent larger than at the same time last year. An early and potentially record large corn-for-silage harvest is apparently responsible for the improvement. Because of excessive rains in large areas of the European USSR, quality is expected to be affected, but a preliminary Soviet report notes that for the country as a whole feed quality is expected to be "somewhat higher than last year."

LIVESTOCK SECTOR UP

Livestock production on Soviet State and collective farms showed a healthy increase through July. For the January-July period meat production was up over 4 percent, milk production was up 5 percent with yields up by nearly 5.5 percent. Egg production increased by 4.4 percent. Livestock inventories continue to lag behind levels for the last two years for all cattle, cows, and hogs, and are up slightly for poultry, and sheep and goats.

USSR Grain Area, Yield, and Production
1975-1987, and 1988 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988 (Projected)	49.0	1.86	91.0
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988 (Projected)	57.0	1.75	100.0
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988 (Projected)	115.0	1.78	205.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1988/89

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
	(Million Metric Tons)										
					Total Grains 4/						
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7
1987/88 5/	211.4	32.0	0.5	243	237	25	5	47	30	130	+6
Projected 1988/89	205.0	27.0	1.0	231	232	25	5	47	23	132	-1
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5
1987/88 5/	83.3	21.5	0.5	104	100	11	1	36	13	39	+4
Projected 1988/89	91.0	14.0	1.0	104	104	11	1	36	10	46	0
					Coarse Grains						
1975/76	65.8	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	--	100	102	12	4	7	10	68	-2
1980/81	80.5	18.0	--	98	101	12	4	7	12	66	-2
1981/82	69.3	26.0	--	95	98	13	3	7	7	68	-3
1982/83	91.8	12.5	--	104	101	13	3	7	9	69	+3
1983/84	101.9	11.5	--	113	112	13	3	7	11	78	+2
1984/85	90.5	26.9	--	117	114	12	4	7	10	81	+4
1985/86	100.0	13.7	--	114	114	12	4	7	9	82	--
1986/87	105.9	11.0	--	117	115	13	4	7	11	80	+2
1987/88 5/	113.7	10.0	--	124	122	13	4	7	15	83	+2
Projected 1988/89	100.0	12.0	--	112	113	13	4	7	12	77	-1

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

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USSR Grain Situation and Outlook

USDA

Prospects for the 1988 USSR grain crop have declined somewhat over the past month as both area and yield appear to be falling short of earlier expectations. Spring grain production has been hardest hit with the estimates of spring wheat, oats, and barley reduced. The USSR's spring wheat crop could be the smallest since 1984. However, this is not expected to result in additional Soviet wheat imports at this time as smaller supplies of quality wheat worldwide have sharply driven up prices. Instead, the Soviets are expected to limit any potential stock buildup in 1988/89 and even could draw on stocks accumulated in recent years if necessary.

GRAIN CROP ESTIMATE LOWERED

The 1988 Soviet grain crop estimate was lowered by 5 million tons to 210 million based on a lower than expected Soviet published preliminary sown area and continued deterioration of spring grain yield prospects, with the exception of corn. Production estimates changed as follows: wheat down by 2.0 million tons to 91.0 million; barley down by 2.0 million to 50.5 million; oats down by 1.5 million to 17.5 million; and corn up by 500,000 to 16.5 million.

Crop conditions since July's lockup have continued to deteriorate, albeit at a slower rate, in many of the spring grain areas including the Urals, upper Volga Valley, Kazakhstan, and West Siberia. The major exception has been the corn crop in the Ukraine and North Caucasus where conditions continue to be favorable.

As of August 8, 1988, the Soviets reported 53.1 million hectares of grains and pulses (excluding corn) had been cut and 50 million threshed. Both the cut and threshed areas were significantly above the recent average.

The USDA has reduced the total area to 115 million hectares based on the preliminary area of 116.1 million and the historical difference between preliminary and final area. Area was reduced as follows: barley down by 500,000 hectares to 28.9 million, and oats down by 500,000 to 11.5 million.

Approved by the World Agricultural Outlook Board – USDA

WEATHER AND CROP DEVELOPMENTS

In the European USSR, above-normal July precipitation covered the Baltic States, the western portion of the Central Region, the Black Soils Region, the Ukraine, the North Caucasus, and the lower Volga. The moisture benefited spring barley in the filling stage and corn advancing through reproduction. Most of July's rain fell during the first 3 weeks, slowing the winter grain harvest. However, the winter grain harvest progressed rapidly in late July and early August due to an extended period of warm, dry weather. For the upper Volga, the Volga Vyatsk, and the eastern portion of the Central Region, July's precipitation was only around 50 percent of normal. July's unfavorable weather conditions in these areas stressed spring grains in the reproductive to filling stages. Since August 4, wet weather returned to the Baltic States, Belorussia, the western portion of the Central Region, the northern Ukraine, and the Black Soils Region. Mostly dry weather in the southern Ukraine and the North Caucasus helped the harvest.

In crop areas east of the Ural mountains, unseasonably warm, dry weather in July continued June's unfavorable weather pattern in the Urals and central crop areas in West Siberia, stressing spring grains in the heading and flowering stages. In Kazakhstan, following adverse hot, dry weather in early July, rain and cooler weather began in major central growing areas around July 10 and continued until month's end, helping to stabilize conditions for those spring grains in the filling stage. Since August 1, widespread showers in West Siberia helped spring grains in the filling stage. Weather conditions since the beginning of the growing season have been mostly favorable for spring grains in East Siberia.

IMPORTS FOR 1988/89

Reports of USSR grain purchases for delivery during the early months of the 1988/89 marketing year have been sparse. Soviet grain buyers may be delaying purchases as a result of prospects for a third consecutive good grain crop and in response to this summer's sharp run-up in world grain prices. USSR purchases of about 1 million tons of U.S. corn are believed to be the only significant business on the books. Canada appears to be delaying grain sales to the Soviets from the 1988 crop until more is known about this year's Canadian crop outturn. Canada is in the third year of their 5-year grain trading agreement with the USSR. The agreement provides for 25 million tons of grain trade over the 5 years. It is estimated that trade for the first 2 years of the agreement has averaged over 5 million tons, annually. Prospects for Argentina and Australia's wheat sales to the USSR are limited until new crop supplies become available late in 1988. However, Argentina still has corn available for sale from the recent corn harvest. The EC has limited sales of new crop wheat and barley until the size and the quality of 1988 crop clarifies. With wheat supplies down in the major exporting countries in 1988/89, it is likely that USSR purchases from smaller suppliers may expand. Eastern Europe is most likely to increase shipments as 1988/89 wheat supplies are significantly larger. In addition, the Soviets have an interest in expanding purchases of East European grain as such purchases are usually covered by some type of reciprocal trade arrangement and consequently reduce Soviet expenditures of hard currency.

Prospects for another large domestic coarse grain crop, particularly corn, and sharply higher world corn prices, are expected to limit USSR coarse grain imports in 1988/89.

IMPORT ESTIMATE FOR 1987/88 UNCHANGED

USSR grain imports for 1987/88 continue to be estimated at 32 million tons, including 21.5 million wheat and 10 million coarse grains. Miscellaneous grains and pulses account for the balance.

The United States was the major source of grain shipments to the USSR in 1987/88, accounting for 60 percent of the USSR's wheat trade and 42 percent of the coarse grain trades. Corn accounted for nearly three-fourths of total USSR coarse grain imports.

DOMESTIC USE ESTIMATE LOWERED

USSR domestic utilization of grain is now estimated at 233 million tons, down 1 million tons from a month ago, and slightly below the year-earlier estimate. With the 1988 harvesting season progressing well, the estimate of dockage and waste has been reduced. Feed use continues to be estimated at 132 million tons, the heaviest on record. As of the end of July, the overall forage yield is likely running at about the same level as last year's high. While output of hay is slightly below 1987's high, haylage production is likely at an all-time high.

FERTILIZER PRODUCTION UP SLIGHTLY, DELIVERIES DOWN

Soviet fertilizer production for the January-June period was 18.7 million tons, up a reported 4 percent from the same period last year and slightly above the planned level (Pravda, 24 July 1988). Fertilizer deliveries in the USSR for the first 6 months of 1987 totalled 13.7 million tons, 301,000 tons less than during the same time frame in 1987. The Russian Republic accounted for nearly 75 percent of the fall in total fertilizer deliveries. Production of plant protectant agents for the January-June period totalled 168,000 tons, 2 percent less than in 1987, but 2 percent above the plan target.

CATTLE AND HOG NUMBERS DOWN, MEAT AND DAIRY PRODUCT OUTPUT UP

As of July 1, cattle and hog numbers were down 2 percent and 1 percent respectively from the same date last year. Livestock production on State and collective farms in the January-June period continued to grow. Meat production reportedly rose 4 percent over the first 6 months of last year, milk production was up 5 percent, and production of eggs increased 5 percent.

USSR: Livestock Inventories on State and Collective Farms, July 1, 1982-88

Inventories	1982	1983	1984	1985	1986	1987	1988
				Thousand head			
Total cattle	94.9	96.4	98.3	98.4	99.2	99.3	97.6
of which cows	30.1	30.0	29.9	29.7	29.4	29.2	28.9
Hogs	56.6	59.3	60.3	57.9	60.2	59.4	58.4
Sheep & goats	141.5	143.7	143.6	138.9	142.8	142.9	145.0
Poultry	751.1	766.2	778.0	791.1	788.1	787.7	790.7

USSR: Livestock Production on State and Collective Farms, January-June 1, Cumulative, 1986-88

	1986	1987	1988
		1,000 tons	
Meat, liveweight	9.5	10.1	10.6
Milk	40.2	41.0	43.6
Eggs, million pieces	29.3	30.1	31.6

USSR Grain Area, Yield, and Production
1975-1987, and 1988 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988 (Projected)	49.0	1.86	91.0
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988 (Projected)	57.0	1.84	105.0
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988 (Projected)	115.0	1.83	210.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1988/89

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
	(Million Metric Tons)										
					Total Grains 4/						
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7
1987/88 5/	211.4	32.0	0.5	243	237	25	5	47	30	130	+6
Projected 1988/89	210.0	25.0	1.0	234	233	25	5	47	24	132	+1
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5
1987/88 5/	83.3	21.5	0.5	104	100	11	1	36	13	39	+4
Projected 1988/89	91.0	14.0	1.0	104	103	11	1	36	10	45	+1
					Coarse Grains						
1975/76	65.8	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	--	100	102	12	4	7	10	68	-2
1980/81	80.5	18.0	--	98	101	12	4	7	12	66	-2
1981/82	69.3	26.0	--	95	98	13	3	7	7	68	-3
1982/83	91.8	12.5	--	104	101	13	3	7	9	69	+3
1983/84	101.9	11.5	--	113	112	13	3	7	11	78	+2
1984/85	90.5	26.9	--	117	114	12	4	7	10	81	+4
1985/86	100.0	13.7	--	114	114	12	4	7	9	82	--
1986/87	105.9	11.0	--	117	115	13	4	7	11	80	+2
1987/88 5/	113.7	10.0	--	124	122	13	4	7	15	83	+2
Projected 1988/89	105.0	10.0	--	115	115	13	4	7	13	78	--

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

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USSR Grain Situation and Outlook

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The outlook for the 1988 USSR grain crop continues favorable. This along, with expectations of strong world grain prices, has resulted in a further reduction in projected 1988/89 grain imports.

Weather and Crop Developments

Above-normal June precipitation covered most crop areas in European USSR, except for those in the eastern half of the Volga where precipitation was below normal. More than twice the normal amount of rain soaked crops in the western and eastern Ukraine, Belorussia, the Black Soils Region, and the North Caucasus. Although the rain in these areas was mostly beneficial for crop growth, locally heavy downpours along with gusty winds and hail caused some crop lodging. During June, winter grains advanced through reproduction in the north and were mostly filling in the south. Spring barley advanced into reproduction and filling in the north and south, respectively. From July 1-6, well above-normal temperatures accompanied drier weather over much of European USSR, accelerating the development of most crops. Maximum temperatures on some days ranged from 33 to 37 degrees Celsius in the southern Ukraine and the North Caucasus, above the optimum levels for corn. On July 7-11, cooler weather and showers returned to these areas.

In spring grain areas east of the Ural mountains, June precipitation was generally less than 50 percent of normal, with central crop areas receiving rainfall amounts less than 25 percent of normal. June's adverse dryness in Kazakhstan was accompanied by hot weather from June 15-19, which depleted soil moisture reserves and caused moderate to severe stress on crops. Eastern portions of Western Siberia received above-normal June rainfall. Hot weather returned to spring grain areas in the eastern Volga, the Urals, and Kazakhstan on June 29, and continued until July 5, stressing grains entering the reproductive phase of development. On July 5-11, showers and cooler weather improved conditions for crop growth, but soil moisture remained unfavorably low.

1988 Crop Estimate Unchanged

The 1988 USSR grain crop continues to be estimated at 215 million tons from a total area of 116 million hectares; however, some changes to individual crop areas and yields have been made. Wheat production was increased by 1 million tons to 93 million, while coarse grains were decreased by 1 million tons to 108 million.

The barley estimate was dropped by 2 million tons to 52.5 million, while the corn estimate was raised by 1 million tons to 16 million. The miscellaneous grains estimate remained at 14 million tons.
The continuation of favorable crop conditions in the European USSR combined with a higher than expected winter wheat area resulted in increased production estimates for winter wheat and corn. In contrast, a persistent dry conditions in the New Lands has resulted in lower yield expectations for spring wheat and spring barley. The spring grains grown in the New Lands are in a low soil moisture situation and require precipitation within the next 2-3 weeks to prevent yield losses. As of July 4, grains and pulses (excluding corn for grain) had been cut on 2.8 million hectares and threshed on 2.0 million hectares.

Import Estimate For 1988/89 Reduced

The estimate of USSR grain imports for July/June 1988/89 has been reduced by 1 million tons to 25 million, the lowest level since 1978/79. Wheat imports are now estimated at 14 million tons down 1 million from the month earlier estimate. Coarse grain imports are unchanged at 10 million tons. Rice, pulses, and miscellaneous grains account for the balance.

Prospects for a larger and higher quality 1988 domestic wheat crop and the recent sharp increase in world wheat prices is expected to dampen USSR wheat import demand. Coarse grain imports in 1988/89 will likely be limited to purchase requirements under various grain trading arrangements as the Soviets are expected to harvest their third consecutive large coarse grain crop. Prospects for the 1988 USSR corn crop appear particularly good which could help hold down 1988 coarse grain imports.

The quality of the 1988 USSR wheat crop could have a major influence on the pattern of world wheat trade in 1988/89. The Soviets have been a major buyer of high-quality milling wheat in recent years numbers. The level of milling quality wheat imports often depend on that year's domestic harvest. Last year's lower quality wheat crop was compensated for by large imports of quality wheat from Canada and the United States. The domestic outturn of quality wheat is expected to be up in 1988/89 which could limit their milling wheat import requirements. Feed wheat imports are expected to comprise only a small portion of the Soviets 1988/89 import program.

Import Estimate Unchanged for 1987/88

The estimate of grain imports for 1987/88 of 32 million tons is unchanged from a month ago. Wheat imports are expected to total 21.5 million, coarse grains 10 million, and miscellaneous grains 500,000 tons.

Estimated Domestic Use Strong

Grain utilization in the domestic market for 1988/89 is projected at 234 million tons only slightly below the year earlier level. Grain requirements for seed, industrial, and food use are again estimated at 77 million tons. The estimate of dockage and waste of 25 million tons is down from a year ago as harvesttime weather is expected to be more favorable than it was a year ago. Continued expansion in livestock production is expected to increase the demand for grain for feed in 1988/89. USSR grain supplies are again expected to exceed projected utilization, permitting another modest addition to grain stocks.

USSR Grain Area, Yield, and Production
1975-1987, and 1988 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988 (Projected)	49.0	1.90	93.0
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988 (Projected)	58.0	1.86	108.0
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988 (Projected)	116.0	1.85	215.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1988/89

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
	(Million Metric Tons)										
					Total Grains 4/						
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7
1987/88 5/	211.4	32.0	0.5	243	237	25	5	47	30	130	+6
Projected 1988/89	215.0	25.0	1.0	239	234	25	5	47	25	132	+5
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5
1987/88 5/	83.3	21.5	0.5	104	100	11	1	36	13	39	+4
Projected 1988/89	93.0	14.0	1.0	106	102	11	1	36	11	43	+4
					Coarse Grains						
1975/76	65.8	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	--	100	102	12	4	7	10	68	-2
1980/81	80.5	18.0	--	98	101	12	4	7	12	66	-2
1981/82	69.3	26.0	--	95	98	13	3	7	7	68	-3
1982/83	91.8	12.5	--	104	101	13	3	7	9	69	+3
1983/84	101.9	11.5	--	113	112	13	3	7	11	78	+2
1984/85	90.5	26.9	--	117	114	12	4	7	10	81	+4
1985/86	100.0	13.7	--	114	114	12	4	7	9	82	--
1986/87	105.9	11.0	--	117	115	13	4	7	11	80	+2
1987/88 5/	113.7	10.0	--	124	122	13	4	7	15	83	+2
Projected 1988/89	108.0	10.0	--	118	117	13	4	7	13	80	+1

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

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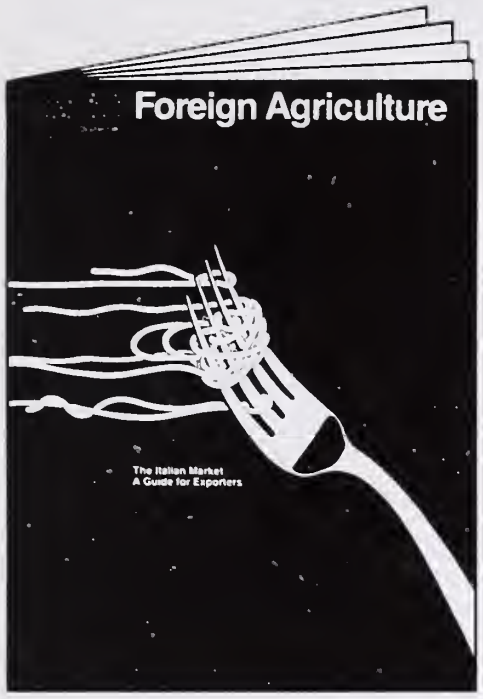

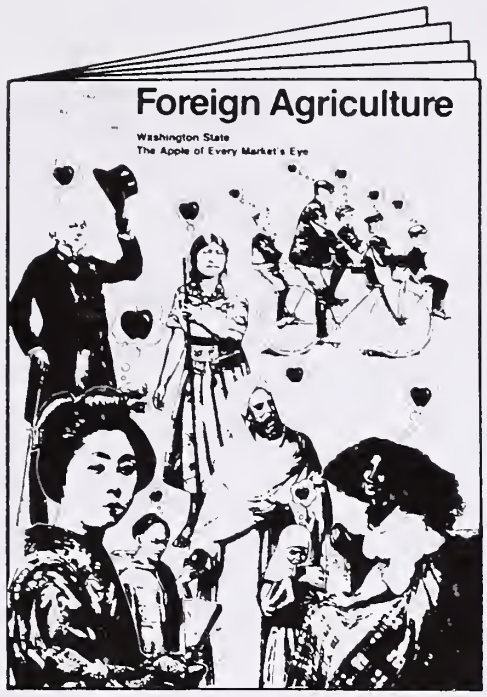

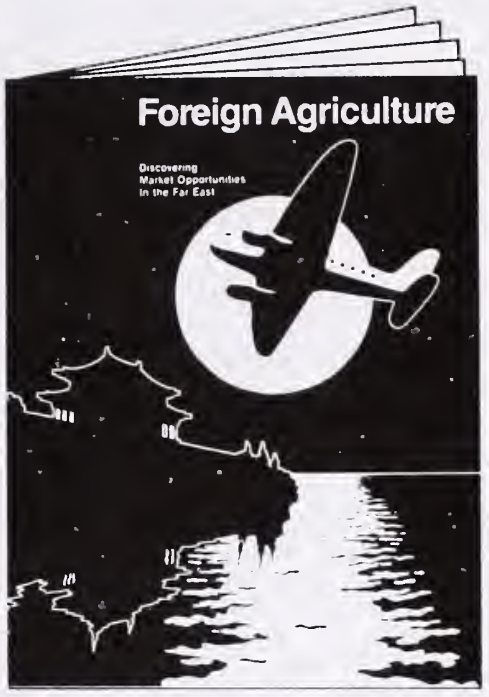

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USSR Grain Situation and Outlook

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Conditions for the 1988 USSR grain crop continue generally favorable. Reflecting prospects for a large 1988 harvest, USSR grain imports are expected to fall to their lowest level in nearly a decade.

1988 CROP ESTIMATE UNCHANGED

The estimate of the 1988 Soviet grain crop remains unchanged at 215 million tons, including 92 million tons of wheat, 109 million of coarse grains, and 14 million of miscellaneous grains and pulses. The total grain area also remains unchanged at 116 million hectares. All estimates of area, yield, and, therefore, production remain unchanged from last month.

In what appears to be a new reporting procedure, Soviet sowing statistics have been published every two weeks this year instead of weekly. As of May 30, area sown to small grains and pulses totaled 74.0 million hectares, virtually identical to last year at this time, but slightly below the recent average for this date.

WEATHER AND CROP DEVELOPMENTS

In the European USSR, above-normal May precipitation covered crop areas in Moldavia, the southwestern Ukraine, the northeastern Ukraine, the southern Black Soils Region, the lower Volga, and the western North Caucasus. Below-normal precipiation covered the Baltic States, Belorussia, the extreme eastern Ukraine, the northern North Caucasus, the northeastern Black Soils Region, the southern Volga Vyatsk, and the upper Volga. Winter grains entered the jointing stage in the south by month's end. Crop progress for spring grains ranged from emergence to tillering in the north to jointing in the south. Since early June, soaking rain covered the western half of the Ukraine, Belorussia, and parts of the Baltic States, benefiting winter and spring grains. Unseasonable hot dry weather over the eastern European USSR increased crop moisture demands. This situation was short lived except for parts of the central Black Soils Region, the lower Volga Valley, and the North Caucasus.

Approved by the World Agricultural Outlook Board – USDA

In crop areas east of the Ural mountains, above-normal May precipiation covered Kazakhstan, West Siberia, and East Siberia, providing ample topsoil moisture for spring grain planting. Although there was below-normal precipitation in the northern Urals, soil moisture was adequate for crop germination. Since early June, light showers covered the northern Urals, West Siberia, and central Kazakhstan, improving conditions for spring grains in the early vegetative stage. Unseasonable warm, dry weather covered crops in the southern Urals.

IMPORT ESTIMATE FOR 1988/89 UNCHANGED

USSR grain imports for July-June 1988/89 are estimated at 26 million tons, unchanged from a month ago. Imports at this level would be the smallest in nearly a decade. Prospects for a large 1988 wheat crop and the likelihood that the quality of the wheat crop will be significantly higher than a year ago are expected to sharply reduce wheat imports. Competition for the USSR wheat market is expected to continue intense particularily if the EC harvests a better quality 1988 crop. The level of USSR feed wheat imports in 1988/89 will depend on the size of the coarse grain crop and the availability of feed quality wheat in the international market. USSR coarse grain imports are expected to hold at around 10 million tons as another large coarse grain crop reduces dependence on imported grain. The bulk of the USSR's 1988/89 coarse grain imports should be covered by various grain trading agreements and arrangements.

1987/88 IMPORT ESTIMATE MOVES DOWNWARD

The pace of late-season USSR wheat imports has slowed, possibly reflecting a reaction to strong world wheat prices and a favorable 1988 crop outlook. USSR wheat imports for 1987/88 are estimated at 21.5 million tons, down 500,000 from last month, but still the second highest on record. The United States, with wheat sales to date of over 12 million tons, will account for over 50 percent of the USSR wheat market in 1987/88, followed by Canada and the EC. The United States again is expected to be the largest supplier of coarse grains to the USSR, with 40 percent of this year's market. Corn will account for nearly three-fourths of USSR coarse grain imports. Barley, principally from Canada and the EC, will account for most of the remainder.

DOMESTIC USE TO CONTINUE HIGH

Domestic grain utilization for 1988/89 is projected at 234 million tons, down slightly from the year-earlier level. Continued growth in the livestock sector is expected to result in another increase in USSR grain for feed use in 1988/89. This will not offset a sharp reduction in this year's allowance for dockage and waste. Grain supplies are expected to exceed projected utilization, resulting in another modest addition to grain stocks.

FERTILIZER PRODUCTION CONTINUES UP

Soviet output of chemical fertilizers in January-April 1988 totaled 12.5 million tons, up 3 percent from the same period in 1987. Production of plant protection agents of 114,000 tons was down 1 percent from the same 4-month period last year.

LIVESTOCK PRODUCTION STILL RISING, INVENTORIES DECLINING

Cattle and hog inventories on State and collective farms continued their decline in 1988, with poultry numbers falling for the first time in over a decade. Production of meat, milk and eggs all increased in the January-April period, with milk yields per cow up a reported 6 percent from the same period in 1987, and egg yields per layer up 5 percent.

USSR: Livestock inventories on State and collective farms
May 1, 1983-1988

Inventories	1983	1984	1985	1986	1987	1988
			Thousand head			
Total cattle	95.9	97.9	98.3	98.9	98.8	97.9
of which cows	29.9	29.8	29.6	29.3	29.1	28.9
Hogs	57.4	59.2	57.4	58.9	59.0	57.7
Sheep & goats	147.7	148.7	143.6	146.5	145.5	148.7
Poultry	768.3	781.0	787.8	802.2	818.3	813.8

USSR: Livestock production on State and
collective farms, January-April, cumulative, 1983-88

	1983	1984	1985	1986	1987	1988
			Thousand tons			
Meat, liveweight	5,172	5,595	5,959	6,406	6,949	7,158
Milk	19,059	20,094	20,001	22,290	23,380	24,804
Eggs, million pieces	17,023	17,666	17,990	19,213	19,715	20,838

USSR Grain Area, Yield, and Production
1975-1987, and 1988 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988 (Projected)	48.5	1.90	92.0
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988 (Projected)	58.5	1.86	109.0
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988 (Projected)	116.0	1.85	215.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1988/89

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
	(Million Metric Tons)										
					Total Grains 4/						
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7
1987/88 5/	211.4	32.0	0.5	243	237	25	5	47	30	130	+6
Projected 1988/89	215.0	26.0	1.0	240	234	25	5	47	25	132	+6
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
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					Coarse Grains						
1975/76	65.8	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	--	100	102	12	4	7	10	68	-2
1980/81	80.5	18.0	--	98	101	12	4	7	12	66	-2
1981/82	69.3	26.0	--	95	98	13	3	7	7	68	-3
1982/83	91.8	12.5	--	104	101	13	3	7	9	69	+3
1983/84	101.9	11.5	--	113	112	13	3	7	11	78	+2
1984/85	90.5	26.9	--	117	114	12	4	7	10	81	+4
1985/86	100.0	13.7	--	114	114	12	4	7	9	82	--
1986/87	105.9	11.0	--	117	115	13	4	7	11	80	+2
1987/88 5/	113.7	10.0	--	124	122	13	4	7	15	83	+2
Projected 1988/89	109.0	10.0	--	119	117	13	4	7	13	80	+2

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2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

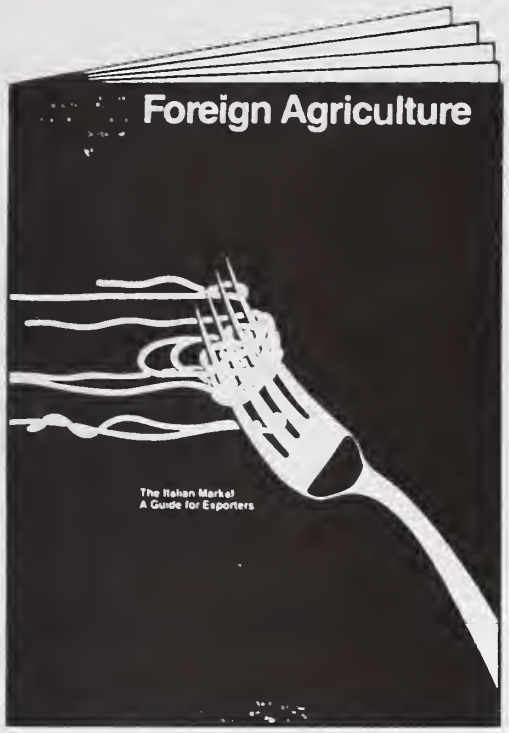
	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total 2/
April 1985	2,016	388	716	930	1,225	5,275	
May	1,566	1,237	468	921	1,368	5,560	
June	106	481	211	1,116	580	2,494	
April-June	3,688	2,106	1,395	2,967	3,173	13,329	14,700
July	8	---	25	208	443	684	
August	---	---	---	152	281	433	
September	---	1,384	---	75	59	1,518	
July-Sept	8	1,384	25	435	783	2,635	3,600
October	411	1,057	89	200	316	2,073	
November	2,487	900	212	485	423	4,507	
December	1,337	750	101	1,155	57	3,400	
Oct-Dec	4,235	2,707	402	1,840	796	9,980	11,400
January 1986	980	171	450	1,160	15	2,776	
February	956	---	494	1,080	---	2,530	
March	71	---	850	852	---	1,773	
Jan-March	2,007	171	1,794	3,092	15	7,079	7,900
April	---	---	373	487	---	860	
May	172	435	575	445	220	1,847	
June	547	646	34	582	172	1,981	
April-June	719	1,081	982	1,514	392	4,688	6,400
July	---	604	---	51	---	655	
August	---	501	---	---	---	501	
September	---	666	14	1	---	681	
July-September	---	1,771	14	52	---	1,837	2,600
October	---	1,027	211	314	---	1,552	
November	--	1,264	300	640	---	2,204	
December	---	1,198	129	740	---	2,067	
October-December	---	3,489	640	1,694	---	5,823	6,900
January 1987	---	383	153	642	75	1,253	
February	---	207	101	1,140	330	1,778	
March	316	497	134	1,165	303	2,415	
Jan-March	316	1,087	388	2,947	708	5,446	6,400
April	1,753	1,018	129	1,452 3/	765	5,117	
May	1,840	777	123	1,050 3/	412	4,202	
June	193	11	13	150 3/	40	407	
April-June	3,786	1,806	265	2,652 3/	1,217	9,726	12,400
July	1,915	---	---	59 3/	10	1984	
August	1,064	---	---	25 3/	---	1,089	
September	316	74	---	25 3/	---	415	
July-September	3,295	74	---	109 3/	10	3,488	4,600
October	---	872	---	550 3/	---	1,422	
November	525	357	---	750 3/	---	1,632	
December	1,703	332	---	450 3/	---	2,485	
October-December	2,228	1,561	---	1,750 3/	---	5,539	6,500
January 1988	1,852	72	---	800 3/	---	2,724	
February	1,746	93	---	800 3/	135	2,774	
March	2,255	101	---	700 3/	384	3,440	
Jan-March	5,853	266	---	2,300 3/	519	8,938	10,200
April	2,406	655	---	N/A	80	3,141	
May	1,850	N/A	N/A	N/A	N/A	1,850	
June							
April-June							

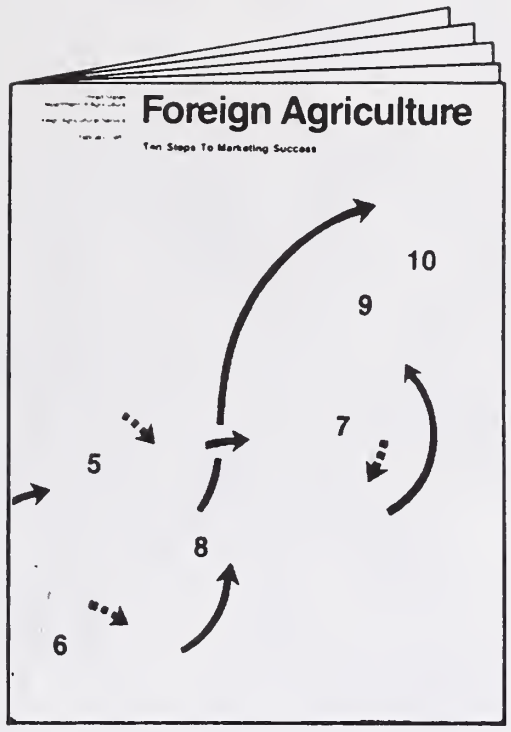
1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

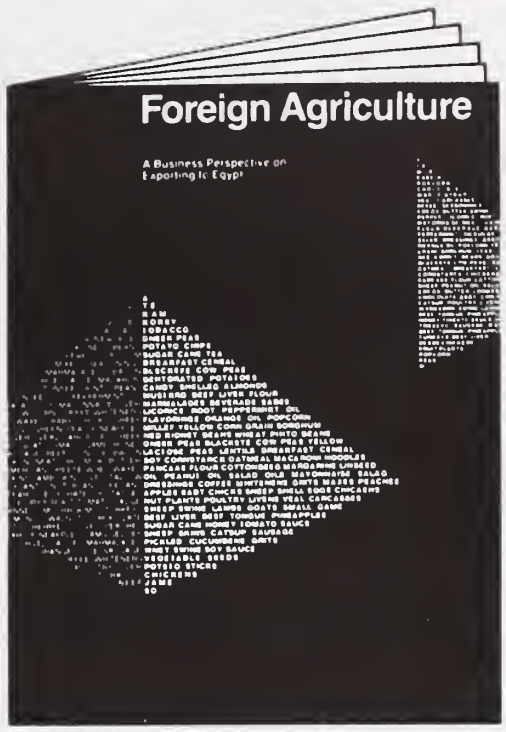
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available







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Circular Series

SG 2-88
May 1988

USSR Grain Situation and Outlook

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The initial USDA projection of the 1988 Soviet grain crop is 215 million tons, up slightly from the 211.4 million tons harvested in 1987. This estimate includes 92 million tons of wheat, 109 million coarse grains and 14 million miscellaneous grains and pulses. Total grain area is estimated at 116 million hectares compared to last year's 115.2 million hectares. Winter grain yield estimates are up from last year, partly because of the favorable growing conditions last fall and the relatively mild winter. Spring grain yields are expected to match last year's level.

These projections are highly tentative, and will be modified as the season progresses by both positive and negative factors, including weather developments.

As of May 2, a reported 20.6 million hectares of small grains and pulses were sown in the USSR. This pace was well ahead of last year's unusually slow progress, but slightly behind the recent average for this date.

WEATHER AND CROP DEVELOPMENTS

Moisture conditions for emergence and establishment of the 1988 winter grain crop were mostly favorable and much better than last year. Overwintering conditions were mostly favorable, with abundant snow cover and near to above-normal temperatures minimizing the potential for winterkill. Moisture accumulations during the winter were near to above normal over most of the European USSR.

Below-normal April precipitation covered most of the European USSR, except for crop areas in Moldavia and the eastern Volga where precipitation was above normal. During April, winter grains in major southern grain producing areas of the Ukraine and North Caucasus advanced into the jointing stage, while crops over the northern half of the European USSR broke dormancy and resumed tillering. Unseasonably warm weather early in the month was replaced by a pronounced cooling trend which began over western areas on April 22, and spread eastward. Although temperatures were not low enough to have an adverse impact on crop development, the unseasonably cool weather slowed winter grain growth.

Since May 1, widespread rain covered crop areas in central Belorussia, the north-central Ukraine, and parts of the Central Region. Winter grains were mostly jointing, with spring grains emerging to tillering over the

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USSR: Grain Production 1987

	Area	Yield	Production
	Million hectares	Ton/Ha	Million tons
Winter Wheat	15.319	3.02*	46.237
Spring Wheat	31.365	1.18	37.075
Total	46.684	1.78	83.312
Winter Barley	1.326	2.66	3.532
Spring Barley	29.328	1.87	54.877
Total	30.654	1.91	58.409
Rye	9.725	1.86*	18.082
Oats	11.790	1.57	18.495
Corn	4.573	3.24	14.808
Millet	2.763	1.42	3.926
Total Coarse Grain	59.505	1.91*	113.720
Buckwheat	1.626	.80	1.297
Rice	.657	4.08	2.683
Pulses	6.424	1.55	9.952
Miscellaneous	.316	1.27	401
Total Miscellaneous	9.023	1.59	14.333
Winter Grains	26.370	2.57	67.851
Spring Grains	88.842	1.62	143.514
Total	115.212	1.83	211.365

* Record Yields

USSR: Fertilizer application to small grains and pulses and corn-for-grain

	Small grains and pulses	Corn-for-grain
	Kilograms/hectare	
1975	42	155
1976	47	145
1977	48	135
1978	51	180
1979	49	192
1980	51	215
1981	51	211
1982	54	182
1983	58	219
1984	65	232
1985	72	200
1986	86	226
1987	89	209

SOURCE: Vestnik statistiki, various years

southern Ukraine and the North Caucasus. Moisture for crop growth was adequate over most of the European USSR. However, well-below-normal rainfall since March 1 over the eastern Black Soils Region, the western Volga, and the northern North Caucasus has limited moisture for early crop growth, and rain is needed to prevent the development of crop stress.

In spring grain areas east of the Urals, spring crop planting normally begins around mid-May. Near to above-normal autumn and winter precipitation provided abundant sub-soil moisture over most areas. Although March and April precipitation was significantly below normal over most areas, widespread light showers since May have helped to increase topsoil moisture for the upcoming planting season.

Grain Supplies To Continue Large

USSR grain supplies for the 1988/89 marketing year are expected to be comparable to the high levels of the previous 2 seasons. The initial projection puts the 1988 grain crop at 215 million tons, fourth largest on record. Imports, currently estimated at 26 million tons, would be the smallest in nearly a decade. Domestic grain utilization is projected at 234 million tons, down from the year earlier level as a modest increase in grain for feed use will not offset a sharp reduction in this year's allowance for dockage and waste. For the sixth consecutive year, USSR grain supplies are likely to exceed projected utilization, resulting in some small addition to year ending grain stocks.

USSR Grain Imports To Decline

The improved outlook for the 1988 USSR grain crop, particularly wheat, is expected to reduce total grain import needs in 1988/89. This year's coarse grain crop is projected at 109 million tons somewhat below last year's large harvest. Coarse grain imports at 10 million tons would be about the same as for the 2 previous years. The bulk of this year's coarse grain imports will likely be from countries with annual grain trading agreements with the USSR.

Wheat imports are expected to decline to 15 million tons, the lowest level since 1979/80. Two major factors affecting the level of USSR wheat imports in 1988/89 will be the quality of the 1988 wheat harvest and how competitively priced feed quality wheat is relative to other grains for feed. For example, the 1987/88 marketing year saw a sharp increase in USSR imports of quality wheat as adverse weather sharply reduced both the size and the quality of the crop. In 1986/87, when the USSR last harvested a wheat crop of around 92 million tons, large feed quality wheat imports bouyed total wheat imports. Imports of miscellaneous grains, pulses and rice are expected to account for the balance of the 1988/89 imports.

Earlier Import Estimates Adjusted

As additional official exporter trade data has become available, modest adjustments have been made in the estimate of USSR grain imports for the 1986/87 and 1987/88 marketing years: where appropriate these changes were offset by corresponding adjustments in utilization or estimated stock change.

Fertilizer Applications Up in 1987

According to the latest Vestnik statistiki (April 1988), despite the 1 percent decrease in grain (excluding corn) area last year, the share of small grain and pulse area fertilized in 1987 fell 1 percent to 72 percent. However, the application of fertilizer on these areas increased 3 percent to a record 89 kilograms per hectare. Likely due to the 8-percent increase in corn-for-grain area in 1987, the share of corn area fertilized fell from 97 percent in 1986 to 95 percent in 1987. Furthermore, the application of fertilizer on this area decreased by 8 percent to 209 kilograms per hectare.

Production of mineral fertilizers in the first quarter of 1988 increased a reported 4 percent from the same period last year, to 9.3 million tons. Total output was reportedly 2 percent above the production plan, even though output of sulfuric acid did not meet plans. Output of plant protection agents in the January-March 1988 period decreased 3 percent from last year, but less than the decrease called for by the production target.

USSR Grain Area, Yield, and Production
1975-1987, and 1988 (Projected)

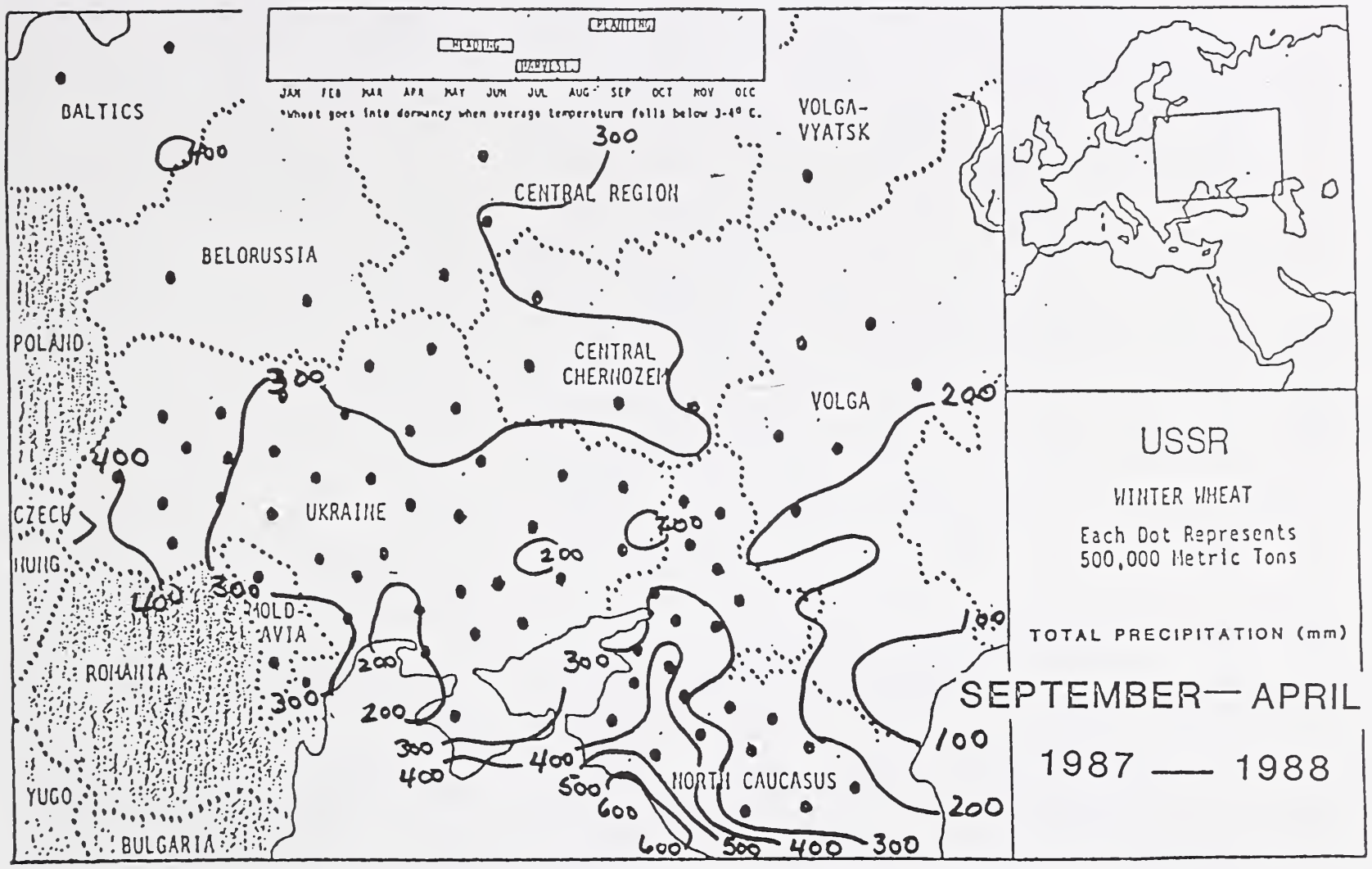
Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988 (Projected)	48.5	1.90	92.0
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988 (Projected)	58.5	1.86	109.0
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988 (Projected)	116.0	1.85	215.0

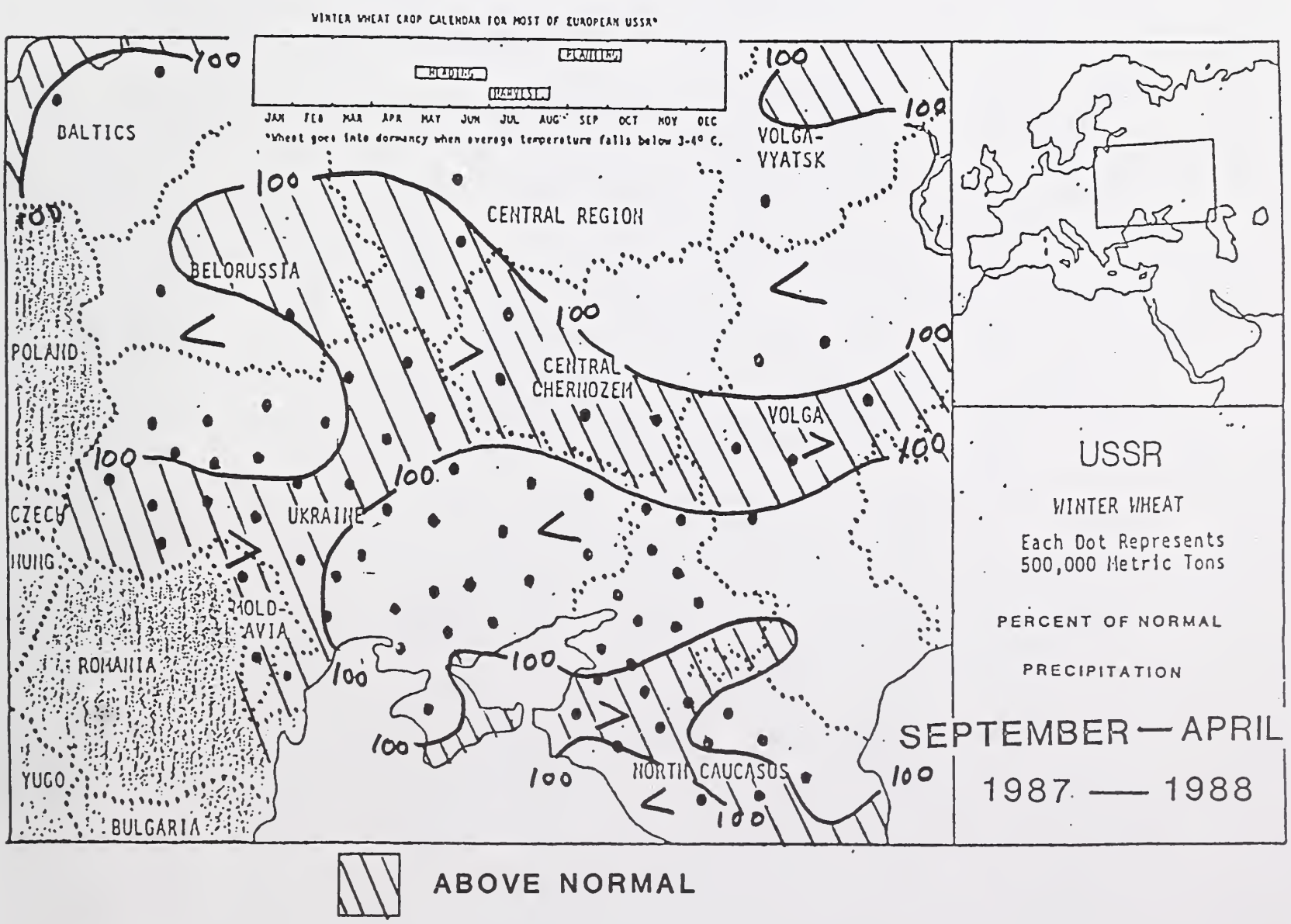
1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1988/89

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
	(Million Metric Tons)										
					Total Grains 4/						
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7
1987/88 5/	211.3	32.5	0.5	243	237	25	5	47	30	130	+6
Projected 1988/89	215.0	26.0	1.0	240	234	25	5	47	25	132	+6
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5
1987/88 5/	83.3	22.0	0.5	105	100	11	1	36	13	39	+4
Projected 1988/89	92.0	15.0	1.0	106	102	11	1	36	11	43	+4
					Coarse Grains						
1975/76	65.8	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	--	100	102	12	4	7	10	68	-2
1980/81	80.5	18.0	--	98	101	12	4	7	12	66	-2
1981/82	69.3	26.0	--	95	98	13	3	7	7	68	-3
1982/83	91.8	12.5	--	104	101	13	3	7	9	69	+3
1983/84	101.9	11.5	--	113	112	13	3	7	11	78	+2
1984/85	90.5	26.9	--	117	114	12	4	7	10	81	+4
1985/86	100.0	13.7	--	114	114	12	4	7	9	82	--
1986/87	105.9	11.0	--	117	115	13	4	7	11	80	+2
1987/88 5/	113.7	10.0	--	124	122	13	4	7	15	83	+2
Projected 1988/89	109.0	10.0	--	119	117	13	4	7	13	80	+2

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.





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USSR Grain Situation and Outlook

Circular Series

SG-1-88
February 9, 1988

The Soviet Union officially reported (Plan Fulfillment Report, January 24, 1988) the 1987 grain crop at 211.3 million tons and an average yield of 1.83 tons per hectare. This results in a calculated area of approximately 115.5 million hectares, down 1 million from 1986 and the lowest since 1959. The latest (January 1988) USDA estimate was 210 million tons with an area of 116.0 million hectares. This is the first time the Soviets have produced a grain crop above 200 million tons in two consecutive years. Except for corn, none of the major grain production figures were published. However, corn and several of the minor grains were reported as follows (USDA previous estimates shown in parenthesis): corn-for-grain, 14.8 million tons (15.0); millet, 3.9 million (2.0); buckwheat, 1.3 million (1.0); and rice, 2.7 million (3.0). No area data was released in this report.

The USDA estimates of coarse grains were changed slightly in order to reflect the new official Soviet grain production figures. Barley production was reduced slightly to 61.6 million tons and the area reduced to 31.2 million hectares, while millet area was slightly increased. Other minor adjustments in yield estimates were made to reflect the new production data. Further adjustments will be made as more detailed official Soviet data is released.

RECENT WEATHER DEVELOPMENTS

Precipitation during January was below normal over much of the European USSR, with above-normal precipitation limited to the western Baltic States, southwestern Ukraine, and Moldavia. While January began with above-normal temperatures, they steadily dropped to much below normal by month's end. On January 30, the coldest weather so far this winter covered winter grain areas. Minimum temperatures in the Central region, the Volga Vyatsk, the Volga, the eastern Ukraine, and the northern North Caucasus ranged from -25 to -32 degrees C, while maximum temperatures ranged from -15 to -20 degrees C. Although winter grains were stressed, the extreme cold was of short duration. In addition, there was sufficient snow cover in most areas to provide protection from potential winterkill. However, some crop damage was possible in the extreme eastern Ukraine and the northern North Caucasus where snow cover was shallow.

Since early February, light, scattered precipitation has accompanied a warming trend over most winter grain areas.

IMPORT ESTIMATE INCREASES

The estimate of USSR grain imports for July-June 1987/88 has been increased by one million tons to 32 million, including 21 million tons of wheat, 10 million coarse grain and the balance--pulses, rice and miscellaneous grains.

Approved by the World Agricultural Outlook Board - USDA

USSR grain purchases from all origins for delivery in the 1987/88 marketing year are now estimated at around 22 million tons, including 17 million tons of wheat. In recent weeks, the USSR has reportedly purchased 450,000 tons of wheat from Argentina, added to earlier purchases of U.S. wheat and agreed on the level of imports from Canada for the balance of the marketing year. Coarse grain purchases continue to lag with only around half the projected 1987/88 imports of 10 million tons believed to be covered.

Not only is the 1987 USSR wheat crop estimated to be down from last year's good harvest but quality was apparently also affected by adverse harvesting weather. Reflecting this, bread quality wheat and durum have accounted for about 90 percent of USSR wheat purchases to date. This is in sharp contrast to a year ago's purchasing pattern when feed wheat accounted for nearly a fourth of total USSR wheat imports.

This year's record coarse grain harvest has resulted in smaller purchases of both coarse grains and feed wheat from the international market. So far, USSR grain buyers are believed to have purchased around 5 million tons of coarse grains about evenly split between corn and barley. The bulk of the remaining USSR coarse grain import requirements are likely to be covered by U.S. and Argentine corn as a huge domestic barley crop could limit further barley purchases.

U.S. EXTENDS ADDITIONAL EEP FOR WHEAT

With the recent U.S. offer of the opportunity to purchase another 2 million tons of wheat under the Export Enhancement Program (EEP), total potential U.S. wheat sales to the USSR during the fifth year of the Long Term Grain Agreement (LTA) have now reached 6.8 million tons. As of February 4, 1988, the USSR had already purchased 4.8 million tons of wheat with slightly over 2 million tons having already been shipped. USSR purchases of wheat for shipment during July-June 1987/88 have already reached 8.1 million tons.

TOTAL GRAIN PROCUREMENT DOWN FROM 1986

The 1987 Plan Fulfillment Report contained no information on total grain procurement from the 1987 crop. This is in contrast to a year ago when the report gave information on both 1986 total crop procurements and comparisons with the year earlier. It is estimated that increased procurements in the Ukraine, Belorussia and the minor Republics failed to offset the declines in the RSFSR and Kazakhstan. In addition, the 1987 Plan Fulfillment Report omitted any mention of wheat unlike the year earlier report which stressed the fact that procurements of quality wheat were up substantially. Based on procurement and production data published in the report and the extremely difficult harvesting conditions in the major spring wheat growing areas, it is expected that purchases of quality wheat will fall well short of the 30 million tons purchased in 1986. This could explain in large part the USSR's heavy purchasing of bread quality wheat in the world market this marketing year.

USSR: Production and State Purchases of Wheat

	1981-85 Average	1985	1986	1987
		Million tons		
Production	77.9	78.1	92.3	1/ 80.5
Purchases	33.7	35.1	43.8	N/A
of which milling quality	2/ 14.0	21.0	30.4	N/A

1/ USDA estimate.
2/ Milling quality wheat refers to durum (tvyerdaya), hard (silnaya) and tsennaya or below silnaya in quality.

Sources: Narodnoye Khozyaistvo, 1987; Zernovoye Khozyaistvo, no. 11, 1987.

DOMESTIC USE ESTIMATE INCREASED

The estimate of domestic use has been increased by 2 million tons to 236 million. Reports from the USSR continue to highlight the difficult harvesting season for the 1987 crop. It now appears that state purchases of grain may have fallen below year ago levels as a larger percent of this year's crop is either being kept on the farm for feeding or is not useable due to increased dockage and waste. Reflecting these problems, the estimate of dockage and waste has been increased to 14 percent of the crop, one of the largest allowances in recent years. Other domestic use estimates are unchanged from a month ago.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1986, and 1987 (Preliminary)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987 (Preliminary)	46.0	1.75	80.5
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987 (Preliminary)	59.8	1.94	115.8
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987 (Preliminary)	115.5	1.83	211.3

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1987/88

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
	(Million Metric Tons)										
					Total Grains 4/						
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	186.8	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	191.7	29.9	0.5	221	218	24	5	47	18	124	+4
1986/87 5/	210.1	28.5	0.5	238	229	24	5	47	23	130	+9
Projected 1987/88	211.3	32.0	1.0	242	236	25	5	47	29	130	+6
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84.3	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78.1	15.7	0.5	93	92	11	1	36	8	36	+2
1986/87 5/	92.3	16.0	0.5	108	102	11	1	36	10	44	+6
Projected 1987/88	80.5	21.0	1.0	100	96	11	1	36	11	37	+4
					Coarse Grains						
1975/76	65.8	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	80.5	18.0	--	98	101	12	4	7	12	66	-2
1981/82 5/	69.3	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	91.8	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	101.9	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90.5	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100.0	13.7	--	114	112	12	4	7	9	80	+2
1986/87 5/	105.9	12.0	--	118	115	12	4	7	11	81	+3
Projected 1987/88	115.8	10.0	--	126	124	13	4	7	16	84	+2

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

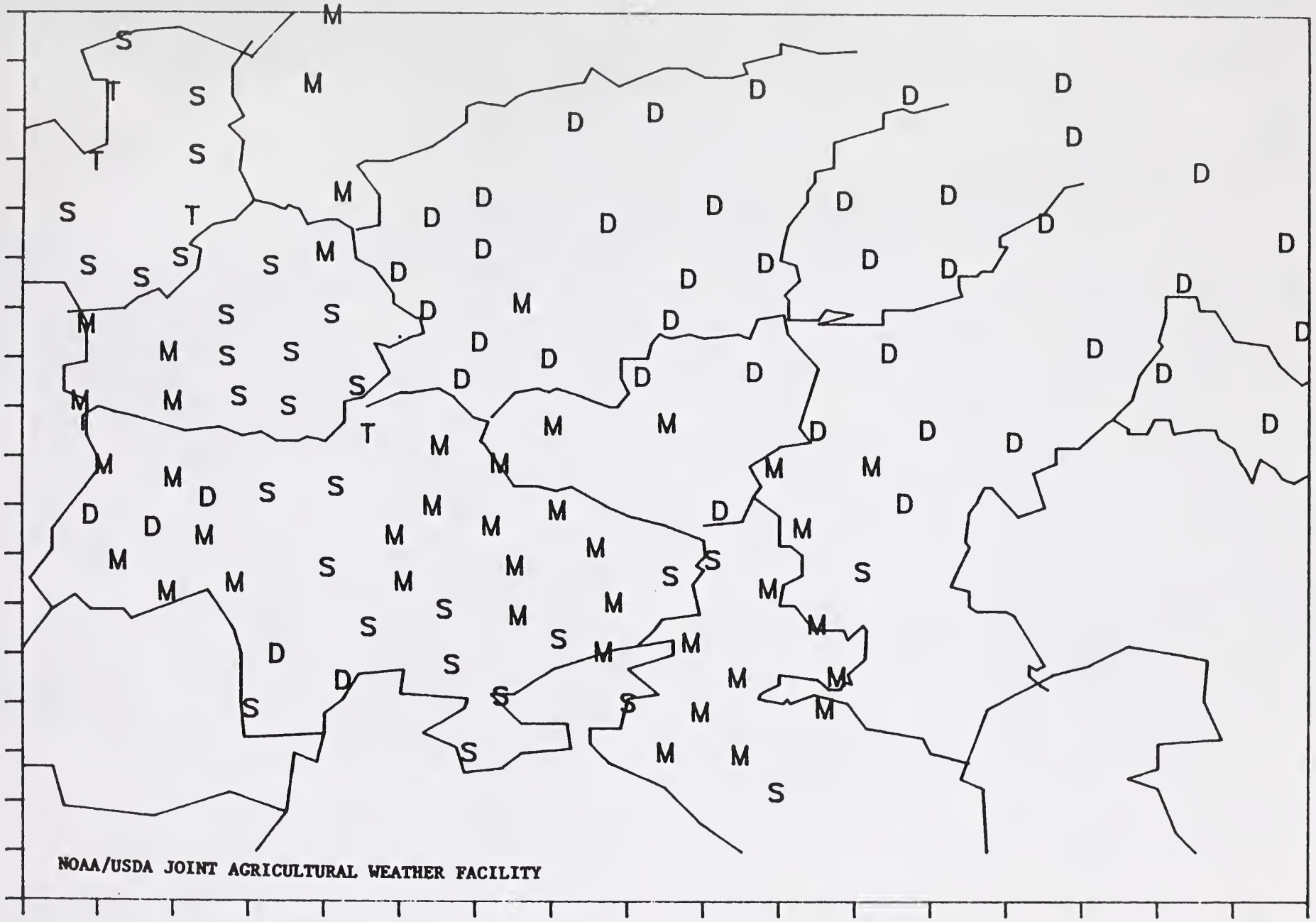
	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total 2/
July 1984	259	1,481	58	59	286	2,143	
August	1,231	1,408	115	444	330	3,528	
September	2,172	1,254	132	943	293	4,794	
July-Sept	3,662	4,143	305	1,446	909	10,465	11,300
October	2,320	809	152	966	302	4,549	
November	3,014	961	244	840	99	5,158	
December	3,535	96	100	512	230	4,473	
Oct-Dec	8,869	1,866	496	2,318	631	14,180	14,800
January 1985	2,218	98	154	599	1,082	4,151	
February	2,196	---	215	572	1,248	4,231	
March	2,023	17	667	934	926	4,567	
Jan-March	6,437	115	1,036	2,105	3,256	12,949	14,000
April	2,016	388	716	930	1,225	5,275	
May	1,566	1,237	468	921	1,368	5,560	
June	106	481	211	1,116	580	2,494	
April-June	3,688	2,106	1,395	2,967	3,173	13,329	14,700
July	8	---	25	208	443	684	
August	---	---	---	152	281	433	
September	---	1,384	---	75	59	1,518	
July-Sept	8	1,384	25	435	783	2,635	3,600
October	411	1,057	89	200	316	2,073	
November	2,487	900	212	485	423	4,507	
December	1,337	750	101	1,155	57	3,400	
Oct-Dec	4,235	2,707	402	1,840	796	9,980	11,400
January 1986	980	171	450	1,160	15	2,776	
February	956	---	494	1,080	---	2,530	
March	71	---	850	852	---	1,773	
Jan-March	2,007	171	1,794	3,092	15	7,079	7,900
April	---	---	373	487	---	860	
May	172	435	575	445	220	1,847	
June	547	646	34	582	172	1,981	
April-June	719	1,081	982	1,514	392	4,688	6,400
July	---	604	---	51	---	655	
August	---	501	---	---	---	501	
September	---	666	14	1	---	681	
July-September	---	1,771	14	52	---	1,837	2,600
October	---	1,027	211	314	---	1,552	
November	--	1,264	300	640	---	2,204	
December	---	1,198	129	740	---	2,067	
October-December	---	3,489	640	1,694	---	5,823	6,900
January 1987	---	383	153	642	75	1,253	
February	---	207	101	1,140	330	1,778	
March	316	497	134	1,165	303	2,415	
Jan-March	316	1,087	388	2,947	708	5,446	6,400
April	1,753	1,018	129	1,452 3/	765	5,117	
May	1,840	777	123	1,050 3/	412	4,202	
June	193	11	13	150 3/	40	407	
April-June	3,786	1,806	265	2,652 3/	1,217	9,726	12,400
July	1,915	---	---	60 3/	10	1975	
August	1,064	---	---	50 3/	---	1,114	
September	316	74	---	50 3/	---	440	
July-September	3,295	74	---	160 3/	10	3,529	4,400
October	---	872	---	600 3/	---	1,472	
November	525	357	---	900 3/	---	1,782	
December	1,703	324	---	1,000 3/	---	3,027	
October-December	2,228	1,553	---	2,500 3/	---	6,281	6,900

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available

FAS, Grain and Feed Division
February 8,1988
0386G

WESTERN USSR: JANUARY 30, 1988

ESTIMATED SNOW COVER



S=SHALLOW, M=MODERATE, D=DEEP

— S = 1–10 CM —— M = 10–30 CM ◇ D = GT 30 CM

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